

Terry Muralt

From: Terry Muralt
Sent: Wednesday, November 06, 2013 5:07 PM
To: dwoodring@dadco.com; brantl@pfm.com
Cc: Dave Waffle; Patrick O'Claire; Amber Hubbard
Subject: Notice of Intent to Award RFP 2816-13 - Investment Advisory Services
Attachments: Interview final scoring_2816-13.pdf

Dear Top Proposers;

The City has completed its evaluation, scoring and ranking of the interviews of the top 2 proposals Davidson Fixed Income Management and The PFM Group for the RFP Investment Advisory Services #2816-13B. The scoring for the interview phase was done from scratch, taking into account all of the information the evaluation team learned from the proposals, interviews and reference checks. The evaluation team used the same criteria and relative weightings in this step of the evaluation process as it used previously to initially evaluate written proposals.

This is the City's official Notice of Intent to award. The City is making a recommendation of award at the November 19, 2013 Council meeting to Davidson Fixed Income Management because they are the highest scoring proposer for this project. Attached you will find the evaluation scoring. If you have any questions please contact me.

Any proposer who contends it is eligible for the award of the contract and feels adversely affected or aggrieved by the City's decision, must submit to the Purchasing Agent a written protest within seven (7) calendar days from date of issuance of the Notice of Intent to Award or its protest is waived. Forward written protests by mail or email to:

Terry L. Muralt, CPPB, Purchasing Agent, tmuralt@BeavertonOregon.gov
City of Beaverton
Finance Department
4755 SW Griffith Dr.
PO Box 4755
Beaverton OR 97076

Any written protest shall specify the grounds upon which the protest is based. Complete rules regarding protests may be found in Beaverton's Purchasing Code 47-0740 as found on www.BeavertonOregon.gov.

If you have any questions about this Notice of Intent to Award, please contact me.

Terry L. Muralt, CPPB
Purchasing Agent
City of Beaverton
4755 SW Griffith Dr
PO Box 4755
Beaverton, OR 97076
Phone: 503-526-2229
Fax: 503-526-2490
Web Site: www.beavertonoregon.gov

EVALUATION MATRIX/SCORING SHEET

Investment Advisor RFP Rating Work Sheet on Interview

FIRM: Davidson Fixed Income Management

Ranking Instructions:	Points	Evaluation Factor:
Quality of Response		1. Signature Page
Excellent Response	4	2. Transmittal Letter
Good Response	3	3. Knowledge, Experience &
Average Response	2	4. Project Approach & Understanding
Poor Response	1	5. Relevant Experience and References
No Response	0	6. Maximum Fee

Evaluation Factor	Max Points	Reviewer 1	Reviewer 2	Reviewer 3	Average
1. Signature Page	N.A.				-
2. Transmittal Letter	N.A.				-
3. Knowledge, Experience & Qualifications of Project Team Members and Firm	32	32	32	30	31.3
4. Project Approach & Understanding	20	20	20	18	19.3
5. Relevant Experience and References	24	24	24	23	23.7
6. Maximum Fee	16	16	16	14	15.3
Total Points	92	92	92	85	89.7

EVALUATION MATRIX/SCORING SHEET

Investment Advisor RFP Rating Work Sheet on Interview

FIRM: PFM (Public Financial Management Inc.)

Ranking Instructions:	Points	Evaluation Factor:	Weight
Quality of Response		1. Signature Page	N.A.
Excellent Response	4	2. Transmittal Letter	N.A.
Good Response	3	3. Knowledge, Experience & Qualifications of Project Team Members and Firm	8
Average Response	2	4. Project Approach & Understanding	5
Poor Response	1	5. Relevant Experience and References	6
No Response	0	6. Maximum Fee	4

Evaluation Factor	Max Points	Reviewer 1	Reviewer 2	Reviewer 3	Average
1. Signature Page	N.A.				-
2. Transmittal Letter	N.A.				-
3. Knowledge, Experience & Qualifications of Project Team	32	24	28	30	27.3
4. Project Approach & Understanding	20	20	17.5	17	18.2
5. Relevant Experience and References	24	24	21	21	22.0
6. Maximum Fee	16	8	8	8	8.0
Total Points	92	76	74.5	76	75.5

Interview Investment Advisor RFP Summary

FIRMS:	Maximum	Reviewer 1	Reviewer 2	Reviewer 3	Average
Davidson	92	92	92	85	89.7
PFM	92	76	74.5	76	75.5

Final Scoring - Post Interview